

Doughnut Shops

The industry periodicals Bakery Magazine and Restaurant Business have provided the following information:

- National Retail Universe - approximately 9,600 outlets
 - 42% or approximately 4,000 outlets are franchised
 - 58% or approximately 5,600 outlets are independently owned

- Industry generated \$1.7 billion in 1990
 - Avg. annual store sales - \$404,000

- Dunkin Donuts is the largest national chain
 - Approximately 2,600 outlets (including 600 recently bought Mister Donut stores)
 - 1990 sales totaled \$1 billion
 - 95% or 2,500 outlets are franchised

- Winchell's is the 2nd largest national chain
 - Approximately 657 outlets
 - 8% or approximately 50 outlets are franchised
 - 92% or approximately 600 outlets are independently owned

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Pizzerias

The information below was obtained from Pizza Today Magazine, Nation's Restaurant News, and Restaurant Business.

- National Retail Universe - approximately 53,000 outlets
 - 44% or approximately 23,000 outlets are chain owned
 - 56% or approximately 30,000 outlets are independently owned
- Industry sales totaled \$14 billion in 1990
- Eating Occasions
 - 56% of adults eat pizza within three months
 - Last time eaten:
 - dinner 61%
 - lunch 20%
 - snack 18%
 - other 1%
- Restaurant Locations
 - 26% Northeast
 - 28% Midwest
 - 27% South
 - 19% West
- Average total expenditure \$3.68
- Pizzerias account for 23% of all take-out's.
- Top 10 chains account for 38% of all pizzerias
- Top 10 chains accounts for 63% of all sales
- Average store does \$508,800 annually

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<u>Pizzeria Demographics</u>		<u>Eat-In</u>	<u>Take-out</u>
Sex:	Male	46.3%	47.9%
	Female	53.7%	52.1%
Age:	18-24	18.4%	18.6%
	25-34	31.6%	31.2%
	35-44	23.1%	23.5%
	45-54	12.2%	13.2%
	55-64	8.8%	7.7%
	65+	5.9%	5.8%
Region:	Northwest	22.1%	24.3%
	Midwest	27.8%	27.1%
	South	28.2%	27.9%
	West	21.9%	20.7%
Income:	\$50,000+	20.8%	22.5%
	\$40-49,999	15.0%	15.4%
	\$30-39,999	19.4%	19.4%
	\$20-29,999	20.2%	19.9%
	Under \$20,000	24.6%	22.7%

Attached are rankings of the top seven chains.

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TOP 100

PIZZA CHAINS RANKED BY U.S. SYSTEMWIDE SALES

1990 Rank	1989 Rank	Chain	Fiscal Year Ends	Systemwide Sales (By Fiscal Year, in Millions)		
				Current	Last full	Prior
1	1	Pizza Hut	Dec. '90	\$3,680.0	\$3,240.0	\$2,890.0
2	2	Domino's Pizza	Dec. '90	2,600.0	2,500.0	2,300.0
3	3	Little Caesars Pizza	Dec. '90	1,500.0	1,130.0	908.0
4	4	Round Table Pizza	June '91	311.0	295.0	267.0
5	7	Sbarro	Dec. '90	250.0	196.0	154.0
6	5	Godfather's Pizza	May '91	240.0	236.0	245.0
7	6	Shakey's	Dec. '90	211.0	202.5	191.0
TOTAL:				\$8,792.0	\$7,799.5	\$6,955.0

Source: NRI Research.

PIZZA CHAINS RANKED BY NUMBER OF U.S. UNITS

1990 Rank	1989 Rank	Chain	Fiscal Year Ends	Year-end Number of Units		
				Current	Last Full	Prior
1	1	Pizza Hut	Dec. '90	7,010	6,400	5,900
2	2	Domino's Pizza	Dec. '90	5,400	5,185	4,893
3	3	Little Caesars Pizza	Dec. '90	3,197	2,632	2,400
4	4	Round Table Pizza	June '91	560	540	525
5	5	Godfather's Pizza	May '91	511	523	580
6	6	Sbarro	Dec. '90	470	384	316
7	7	Shakey's	Dec. '90	216	210	224
TOTAL:				17,364	15,874	14,838

Source: NRI Research.

PIZZA CHAINS RANKED BY TOP 100 MARKET SHARE

1990 Rank	1989 Rank	Chain	Fiscal Year Ends	Annual Market Share		
				Current	Last Full	Prior
1	1	Pizza Hut	Dec. '90	41.85%	41.54%	41.55%
2	2	Domino's Pizza	Dec. '90	29.57	32.05	33.07
3	3	Little Caesars Pizza	Dec. '90	17.05	14.49	13.06
4	4	Round Table Pizza	June '91	3.54	3.78	3.84
5	7	Sbarro	Dec. '90	2.84	2.51	2.21
6	5	Godfather's Pizza	May '91	2.73	3.03	3.52
7	6	Shakey's	Dec. '90	2.40	2.50	2.75

Source: NRI Research.

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Hardware Stores

This data was compiled from the following trade journals: Hardware Age, and Hardware Trade.

National Retail Universe - approximately 25,100 outlets.

- Approximately 13% or 3,263 are chain owned
- Approximately 87% or 21,837 are independents
- Profile of Hardware Stores
 - 69.3% of sales are to the public
 - 30.7% to professionals
 - Average sale is \$11.71
 - Average store makes 1,313 sales weekly
 - Average store does \$799,400 annually
 - Sales per square foot are \$117.58
 - Inventory turnover is 2.5 times annually
 - Average gross margin is 35.4%
 - 69.3% of sales are cash
 - 30.7% credit
 - 26.1% of all stores are in shopping centers

Customer Shopping Habits

Average time spent in stores
Average number of items bought
Percent buying on impulse
Percent of expenditures on impulse
Percent who shop alone

Hardware Store

8 minutes
4.0%
46.0%
27.3%
70.7%

- Women buy 25% of all hardware/tools
- Women buy 37% of all do-it-yourself (DIY) supplies
- Of all adults who bought anything in a retail store on the average weekday, 1.6% made their largest purchase in a hardware store.

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<u>What Hardware Stores Sell</u>	<u>Percent Selling</u>	<u>Percent of Sales</u>
Lawn & Garden	96.3%	12.1%
Housewares	87.2%	7.6%
Hand & Power Tools	100.0%	10.5%
Paint & Decorating Supplies	98.3%	12.7%
Sporting Goods	61.5%	3.1%
Plumbing/Heating/Cooling	100.0%	13.2%
Electrical	100.0%	15.3%
Hardware	100.0%	15.3%
Major Appliances/Electronics	30.1%	2.9%
Lumber	18.3%	0.8%
Other Building Materials	30.6%	1.7%
Automotive Supplies	78.7%	2.8%
Other	79.4%	7.5%

Demographics

Sex:	Male	50.8%
	Female	49.2%
Age:	18-34	24.2%
	35-44	34.7%
	45-54	16.0%
	55+	25.1%
Housing:	Own	64.9%
	Rent	35.1%
Region:	Northeast	21.3%
	Midwest	37.3%
	South	33.8%
	West	7.6%
Income:	\$50,000+	6.2%
	\$30-49,999	40.3%
	Under \$30,000	53.5%
HH Size:	1	20.9%
	2-3	68.3%
	4+	10.8%

Attached is a list of the Top 30 hardware chains.

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TOP HARDWARE CHAINS BY SALES

<u>Company Name</u>	<u>Address</u>			<u>Sales in \$ Million</u>
Cotter & Co. (True Value)	2740 N. Clybourn Ave.	Chicago	IL	2,004
Ace Hardware Corp.	2200 Kensington Ct.	Oak Brook	IL	1,382
American Hardware Supply Co.	P.O. Box 1510	Butler	PA	900
Coastamerica Corp.	P.O. Box 5820	Denver	CO	526
West Union Corp.	P.O. Box 3177	Memphis	TN	200
Action Industries Inc.	460 Nixon Rd.	Cheswick	PA	155
Our Own Hardware Co.	P.O. Box 720	Minneapolis	MN	126
Moore Handley Inc.	U.S. Hwy 31 S	Pelham	AL	100
United Hardware Dist. Co.	5005 Nathan Lane	Plymouth	MN	93
California Hardware Co.	P.O. Box 760	LaPuente	CA	90
USCP-Wesco Inc.	444 Ayers Ave.	Los Angeles	CA	84
Kar Products	461 N. Third Avenue	Des Plaines	IL	70
L.G. Cook Distributor	5400 33rd St., S.E.	Grand Rapids	MI	65
Emery Waterhouse Co.	P.O. Box 659	Portland	ME	65
Frederick Trading Co.	7901 Trading Lane	Frederick	MD	65
Service Supply Co.	P.O. Box 732	Indianapolis	IN	65
Monroe Hardware Co.	101 Sutherland Ave.	Monroe	NC	63
Vermont Amer. Corp. Vermont/ American Tool Co.	P.O. Box 340	Lincolnton	NC	55
Handy Hardware Wholesale Inc.	P.O. Box 12847	Houston	TX	55
RKB Enterprises Inc.	1575 Lake Street	Elmira	NY	55
Bostwick-Braun Co.	P.O. Box 912	Toledo	OH	52
George Worthington Co.	8100 Tyler Blvd.	Mentor	OH	52
General Hardware Co.	1010 Scott Avenue	Greensboro	NC	50
Witte Hardware Corp.	4600 Goodfellow Ave.	St. Louis	MO	50
Wyeth Co.	101 Jules St.	St. Joseph	MO	48
Carlson Systems (Omaha)	8990 F Street	Omaha	NE	45
Jensen-Byrd Co. Inc.	W. 314 Riverside	Spokane	WA	42
H. and E. Bros. Inc.	2420 W. Main Street	Barstow	CA	41
Joseph Leavitt Corp.	1062 Millbury Street	Morristown	PA	40
Wallace Hardware Co.	P.O. Box 687	Morristown	TN	40

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Auto Parts Stores

The information below was ascertained from the following periodicals: Chilton's Automotive Marketing, Aftermarket Business, and Auto Merchandising News.

- National Retail Universe - approximately 53,000 outlets
 - Approximately 14,000 outlets are chain owned
 - Approximately 39,000 are independently owned
- Industry totaled \$32 billion in 1990
- When shopping for auto parts, 74% go to an auto parts store vs. other store types (ex. supermarket, mass merchandiser, home center)

AVERAGE AUTO PARTS STORE PROFIT MODEL

	<u>1986</u>	<u>1989</u>
Net Sales	\$657,815	\$965,278
Cost of Goods Sold	394,229	653,016
Gross Margin	263,586	318,743
Other Income	3,026	15,119
Total Expenses	244,905	344,235
New Profit	21,707	19,306
Pre-Tax Net Profit Margin	3.3%	2.0%
Return on Assets	7.9%	4.8%
Financial Leverage	1.7%	2.6%
Pre-Tax Return on Net Worth	25.1%	12.2%

Source: APAA 1987 and 1990 Cost of Automotive Retailing Study

<u>Top Ten Auto Parts Retailers</u>	<u>Number of Stores</u>	<u>Sales (000)</u>
<u>Chain</u>		
Northern Automotive	825	\$770,000
AutoZone	535	535,000
Chief Auto Parts, Inc.	500	292,500
Western Audio	332	1,200,000
Trak Auto	332	1,200,000
Nationwide Automotive, Inc.	275	290,000
The Pep Boys	267	798,691
Advance Stores Company	170	100,000
Super Shops	145	180,000
PACCAP	140	200,000

Source: Automotive Marketing

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Auto Parts Stores Product Mix

• Tires	39.7%
• Auto Parts	32.4%
• Accessories	9.3%
• Petroleum Products	2.8%
• Batteries	2.3%
• Labor and Service	10.9%
• All Other	2.6%

Store Size

- \$1+ million annually	21.3%
- \$500,000-999,999	24.5%
- \$100,000-499,999	47.2%
- under \$100,000	7.0%

Demographics

- 81.7% of auto parts store customers are male.
- 14.8% female
- 3.5% no reply

- - 18 3.4%
- 18-25 26.0%
- 26-35 28.3%
- 36-45 20.0%
- 48-55 10.4%
- 56+ 8.4%
- no reply 3.5%

- 29.7% own one car
- 34.7% two
- 35.6% three or more

Aftermarket Business, 1989

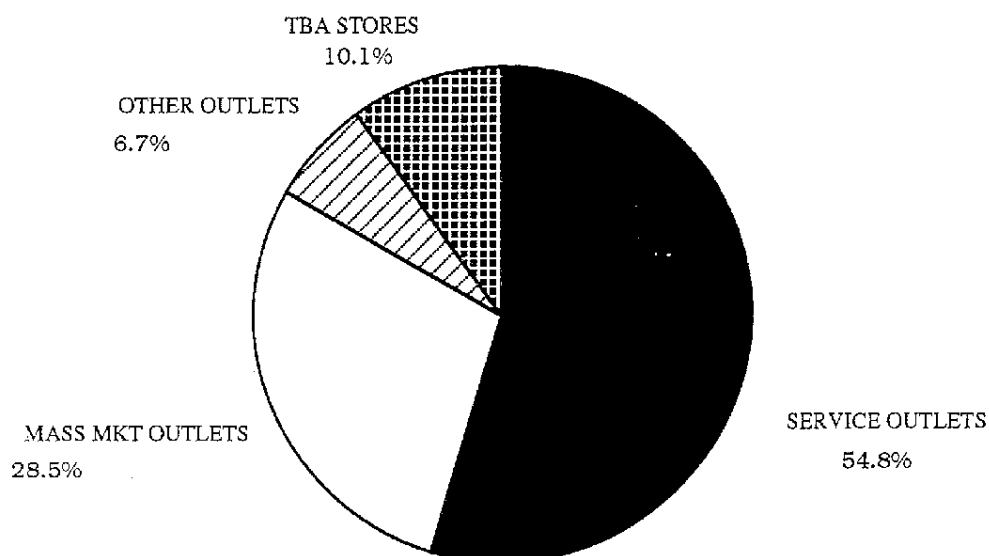
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Incidence of Do-It-Yourself (DIY) Activity
Found Among Adults 18-64 Who Take Responsibilities for Car Maintenance

	<u>A Lot</u>	<u>Moderate</u>	<u>None</u>
Total	34%	32%	34%
Sex: Male	47%	33%	20%
Female	13%	30%	57%
Age: 18-24	42%	44%	14%
25-34	44%	31%	25%
35-44	31%	32%	37%
45-54	28%	32%	40%
55-64	21%	23%	56%
Income: \$35,000+	30%	33%	37%
\$25-34,999	38%	35%	27%
\$15-24,999	33%	32%	35%
Under \$15,000	39%	27%	34%
Region: Northeast	25%	36%	39%
Midwest	39%	31%	30%
South	33%	31%	36%
West	40%	31%	29%

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**SHARE OF RETAIL MARKET FOR
AUTOMOTIVE PRODUCTS**



Source: APAA 1989 Retail Distribution of Automotive Products Study
TBA: Tires, Battery, and Accessories

Attached is a list of the top 100 chains.

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THE 1990 AM LARGEST 100 AFTERMARKET CHAINS

Rank	Chain	# of Stores	# of Bays	\$ Sales (+ 000)	CEO	Address and Phone	% of DY
1.	Northern Automotive ¹	325	150	770,000	Julius Trump	645 Missouri Ave., Suite 400, Phoenix, AZ 85012 (602) 265-9200	95%
2.	Genuine Parts ¹⁰	370	0	500,000	Larry L. Prince	2999 Circle 75 Pkwy., Atlanta, GA 30339 (404) 953-1700	30%
3.	AutoZone	535	0	535,000*	Peter Formanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	95%
4.	Chief Auto Parts Inc.	500	0	292,500*	Mike Manor	15303 Dallas Pkwy. Ste 800, Dallas, TX 75248 (214) 404-1114	95%
5.	Western Auto	332 ²	1,489	1200,000	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	95%
6.	Trak Auto	309	0	275,700	Edward E. Szydlak	3300 75th Ave., Landover, MD 20785 (301) 731-1200	95%
7.	Nationwide Automotive, Inc.	275	346	290,000*	Saul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	95%
8.	The Pep Boys	267	2,400	798,691	Mitchell G. Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	99%
9.	Parts Inc. ⁴	203	0	145,500*	Michael Ormiston	501 S. Dudley, Memphis, TN 38104 (901) 523-7711	35%
10.	Advance Stores Co.	170	0	100,000*	Nicholas Taubman	1342 W. Eighth, Roanoke, VA 24015 (703) 345-4911	99%
11.	Fisher Auto Parts	150*	0	107,500*	Art Fisher	512 Greenville Ave., Staunton, VA 24401 (703) 885-8901	20%
12.	Super Shops	145	350	180,000	Harry Eberlin	620 Newport Center Dr., Ste 860, Newport Beach, CA 92660 (714) 644-9900	95%
13.	PACCAR ⁵	140	600	200,000*	John Willingham	1400 North 4th St., Renton, WA 98055 (206) 251-7600	93%
14.	Discount Auto Parts, Inc.	125	0	75,000*	Denis L. Fontaine	4900 S. Frontage Road, Lakeland, FL 33802 (813) 687-9226	99%
15.	Whitlock ³	121	0	71,000*	Dean Haulton	1375 Mt. Prospect Rd., Des Plaines, IL 60018 (708) 699-5040	95%
16.	Sieg Auto Parts	121	0	45,000	Madis Sulg	500 Iowa St., POB 4230, Davenport, IA 52808 (319) 323-3641	5%
17.	APS ¹⁸	113	0	80,000	Richard J. Spelleri	3000 Pawnee St., Houston, TX 77054 (713) 741-2470	30%
18.	O'Reilly Automotive (Ozark)	107	0	85,000	Charles O'Reilly	233 S. Patterson, Springfield, MO 65802 (417) 862-3333	55%
19.	H&LO Auto Supply Companies ²	104	0	113,700	T. Michael Young	8601 Tavenor, Houston, TX 77057 (713) 991-6052	85%
20.	General Parts ¹⁶	102*	0	75,000*	Temple Sloan	2635 Millbrook Rd., Raleigh, NC 27604 (919) 876-9813	20%
21.	Straus-Frank Inc. ¹⁵	92	0	70,000	David Straus	POB 500, San Antonio, TX 78292 (512) 341-5531	30%
22.	Rose Auto Stores (Whitlock)	90	0	53,000*	Donald Goodman	4760 NW 165th St., Hialeah, FL 33014 (305) 625-7786	95%
23.	ADAP (Rite Aid)	80	0	62,000	Wayne Yodzio	660 Badwell St., Ext. Avon, MA 02322 (617) 587-8400	99%
24.	R&S/Strauss (Whitlock)	75	168	107,000*	Alfred Woods	1835 Burnet Ave., Union, NJ 07083 (201) 686-8200	95%
25.	Hahn Automotive	74	0	73,000*	Mike Futerman	415 W. Main St., Rochester, NY 14608 (716) 235-1595	40%

Rank	Chain	# of Stores	# of Bays	\$ Sales (+ 000)*	CEO	Address and Phone	% of DY
26.	Republic Auto ¹¹	72	0	627,000	Keith Thompson	POB 2088, Brentwood, TN 37024 (615) 373-5275	40%
27.	Parts Depot/Steego Auto Parts	72	0	40,000	Rolance Olson	2177 Dale Ave., Roanoke, VA 24013 (703) 345-1001	40%
28.	Crow-Buntingame	72	0	34,000	Fletcher Lord, Jr.	520 W. Capital, Box 111, Little Rock, AR 72203 (501) 372-5275	25%
29.	Quality Stores	64	100	90,000*	John L. Hill	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	95%
30.	Hi-Gear Tire & Auto Supply	61	0	36,000*	Stan Love	110 Ritchie Rd., Capitol Heights, MD 20743 (301) 336-3000	95%
31.	A.I. Automotive ²⁸	60	0	10,000	Stuart Baxter	Bldg 200, Ste 508, Nashville, TN 37217 (615) 367-9495	30%
32.	Action Auto ⁷	50	300	104,700	Dick Saba	2128 S. Dort Hwy., Flint, MI 48507 (313) 235-5600	95%
33.	Brooks Auto Parts/Supply ¹⁹	50	0	36,000*	Elton D. Brooks, Jr.	402 S. Peterson Ave., Douglas, GA 31533 (912) 384-7818	45%
34.	Kentucky Motor Service (KOF)	50	0	36,000*	Anthony W. Netter	POB 395, Covington, KY 41011 (606) 431-6025	30%
35.	Forest City Auto Parts Co., Inc.	50	0	29,000*	Arnold Bellowe	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	90%
36.	Big Bear Stores	46	0	32,000	Jerry Hammerel	640 54th Ave. N., St. Cloud, MN 56301 (612) 251-9000	95%
37.	Pettigrew-Smith/Dale's	43	0	25,000*	Bob Merrill	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	95%
38.	Ace Auto Parts	39	0	23,000*	Thomas D. Cox	4750 118th Ave. N., Clearwater, FL 34622 (813) 573-2800	95%
39.	Taylor Parts, Inc. (TPS)	36	0	55,000	James M. Taylor II	208 E. 3 Notch St., Andalusia, AL 36420 (205) 222-5534	40%
40.	Big Wheel Auto/Rossi Stores ¹⁴	36	0	24,000	R.B. Shaller	2300 P. Lot Knob Rd., Mendota Heights, MN 55120 (612) 452-7484	95%
41.	Main Auto Parts	35	0	25,000*	Bart Weprin	1422 N. Main, Dayton, OH 45405 (513) 277-7393	20%
42.	Anderson Auto Parts ¹²	35	0	21,000	H.G. Anderson III	POB 767, Anderson, SC 29622 (803) 224-6321	15%
43.	The Carport (Hanco Drug)	34	0	20,000*	David Fuhrman	3925 Rice Mine Rd., Northport, AL 35476 (205) 345-2400	85%
44.	Murray's Discount Auto Stores	34	0	20,500*	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	50%
45.	Worldwide Auto Parts, Inc.	31	7	19,000	Jim Fox (COO)	87 Brooklyn Ave., Youngstown, OH 44507 (216) 782-2204	95%
46.	Northern Auto Supply Co.	30	0	17,500	Don Komis	1906 N. Peach St., Marshfield, WI 54449 (715) 384-2134	25%
47.	J. Burdman Auto Parts	30	0	5,000	Bernard Burdman	801 N. Franklin St., Kirksville, MO 63501 (816) 665-3787	15%
48.	Benny's	29	12	25,000	Malcolm C. Bromberg	340 Waterman Ave., Esmond, RI 02917 (401) 231-1000	95%
49.	Linkon's Auto Supply	29	0	6,000	Leonard Linkon	2720 E. 2nd St., Centralia, IL 62801 (618) 533-1311	50%
50.	Automotive One Parts Stores ³¹	28	0	17,000	Robert H. Gentry III	701 W. Church St., Orlando, FL 32802 (407) 422-1113	45%

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Rank	Chain	# of Stores	# of Bays	\$ Sales (+000)*	CEO	Address and Phone	% DT
51.	Twin "B" Auto Parts ¹⁴	28	0	15,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	99%
52.	Ben Pika Speed Shops	28	0	11,000	Ben Pika	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	95%
53.	Cardis ¹⁵	27	0	17,000	Ken Walker	12950 E. Alondra Blvd., Cerritos, CA 90701 (213) 926-4492	45%
54.	ITM Automotive Parts	26	0	26,000	Ed Lynch	13140 Alondra Blvd., Cerritos, CA 90701 (213) 926-6582	35%
55.	Barnes Motor & Parts	26	0	20,000	Robert E. Kirkland, Jr.	315 E. Barnes St., Wilson, NC 27893 (919) 243-2161	25%
56.	Davis & Wilmar ¹⁶	26	0	17,000*	Gary Davis	609 Epsilon Dr., Pittsburgh, PA 15238 (412) 963-7776	30%
57.	Parts City, Inc. (Alex. Seewald)	26	0	13,000	Andy Moye	1420 Seaboard Industrial Blvd., Atlanta, GA 30318 (404) 352-0146	99%
58.	Wheels Discount Auto Stores (Fay Drugs)	25	0	15,000*	Gale Mitchell	4577 Buckley Rd., Liverpool, NY 13088 (315) 652-7000	95%
59.	SAS Auto Parts Co.	23	0	20,000	George Segal	129 Manchester St., Concord, NH 03301 (603) 225-4003	25%
60.	Allied Auto Parts Co.	23	0	14,000	Daniel Sennet	43 N. Montello St., Brockton, MA 02401 (508) 588-8500	30%
61.	One Stop Auto Parts	23	0	13,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg, FL 33702 (813) 522-2897	90%
62.	Himet Auto Parts/Motor Supply	23	0	11,000	F. Garacci	1215 E. Main, New Iberia, LA 70560 (318) 364-7201	30%
63.	Kirkham Auto Parts	23	0	10,000	Michael Kirkham	POB 718, Blackfoot, ID 83221 (208) 785-2902	50%
64.	Keenan Auto Parts ¹⁵	22	0	15,000*	Frank Ahouse	112 N. Front St., Albany, GA 31703 (912) 436-3311	5%
65.	688 Parts Service, Inc.	22	0	12,000	George E. Tricou Jr.	9126 Green Springs Rd., Baton Rouge, LA 70814 (504) 924-6888	25%
66.	Acme Auto Supply, Inc. ²⁰	21	0	20,000	James Fine	620 R. Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	30%
67.	Erich/Vairland Auto Parts ²²	21	0	15,000	Herbert August	POB 277, Albany, NY 12202 (518) 449-1176	40%
68.	BWP ¹⁵	21	0	15,000*	Neil Stoket	1055 Bronx River Ave., Bronx, NY 10472 (212) 991-9000	1%
69.	Motor Bearings & Parts Co.	21	0	12,000	Bill White	427 S. Dawson St., Raleigh, NC 27602 (919) 8320-3961	1%
70.	Beacon Auto Parts, Inc.	20	0	18,000	Fred Piscioffa	911 Lowry Ave., Jeannette, PA 15644 (412) 527-5612	39%
71.	Foreign Autoparts	20	0	18,000	Steve Patkin	1205 Route One, Sharon, MA 02067 (617) 784-1111	70%
72.	Performance Centers of America	20	0	18,000	Donald R. Raleigh	180 Whitman Ave., Edison, NJ 08817 (201) 287-5200	95%
73.	The Fox Group, Inc. ⁸	20	0	16,000	William Fox, Jr.	23444 Schoenherr, Warren, MI 48089 (313) 774-4940	95%
74.	Sturdevant's Inc. ¹⁷	20	0	14,000	Jack Sturdevant	POB 948, Sioux Falls, SD 57101 (605) 336-0678	30%
75.	Giant Auto Parts	20	0	14,000*	Robert Levy	2236 S. Hamilton Ave., White Hall, OH 43232 (614) 864-3811	30%

Rank	Chain	# of Stores	# of Bays	\$ Sales (+000)*	CEO	Address and Phone	% DT
76.	Royal Auto Supply	20	0	10,000	Jon Sienn	Twin Park Industrial Center, Coimbat, PA 18915 (215) 822-1359	95%
77.	All State Auto	20	0	10,000	Warren Morgan	3131 N. I-10 Service Rd., Metairie, LA 70002 (504) 834-5500	80%
78.	Gatling's Auto Stores ³⁰	20	5	9,000	Albert C. Premus	117 W. Peach St., Connellsville, PA 15425 (412) 628-3340	90%
79.	Automyte	20	0	4,000	David Stucky	POB 578, Hemingway, SC 29554 (803) 558-3914	50%
80.	Auto Value Stores ²⁰	19	0	24,000	Allen Bennett	3869 N. Dixie Hwy., Oakland Park, FL 33334 (305) 565-4636	40%
81.	Moln Auto ²²	19	0	19,000	Carl E. Moln	3896 Union Rd., Buffalo, NY 14225 (716) 633-4455	15%
82.	Arnold Motor Supply	19	0	16,000	Garian Odor	110 W. 4th, POB 5008, Spencer, IA 51301 (712) 262-4287	20%
83.	VIP Discount Auto ¹⁴	19	57	14,000*	Thomas O. Auger	12 Lexington St., Lewiston, ME 04240 (207) 784-5423	40%
84.	Interstate Auto ¹⁹	19	0	11,000	J. Lon Schuster	311 E. Dixie, Elizabethtown, KY 42701 (502) 765-6183	30%
85.	Flowers Auto Parts ¹⁶	19	0	11,000	John R. Flowers	105 S. Center St., Hickory, NC 27603 (704) 322-5414	10%
86.	Loe's Auto Parts	19	0	10,000	John Loe	401 NE Front St., DeKalb, TX 75559 (214) 667-2541	30%
87.	Auto Parts World	18	0	18,000	Andrew Dabrowski	1176 W. 14 Mile Rd., Clawson, MI 48017 (313) 288-3845	90%
88.	All-Car Automotive Centers	18	14	16,000	Lester R. Cigel	1520 S. Superior Ave., Antigo, WI 54409 (715) 623-3791	80%
89.	Byrd's Auto ¹⁰	18	0	13,000*	Stan Byrd	262 N. Main St., Burlington, NC 27215 (919) 226-0244	10%
90.	Von Housen Auto Parts	17	0	12,000	Robert Neeley	2634 Juniper Lane, Sacramento, CA 95825 (916) 485-7552	50%
91.	Acme Auto	17	0	12,000*	Curt Myers	1731 S. 19th St., Harrisburg, PA 17104 (717) 939-7893	20%
92.	National Auto Supply	17	0	12,000*	Clifford Shantfeld	8514 Eager Rd., St. Louis, MO 63144 (314) 968-8511	5%
93.	Parker Auto Supply ¹⁹	17	0	12,000*	W.W. Parker	POB 760, Sumter, SC 29151 (803) 775-6721	10%
94.	Rodetfeld's	17	0	11,000	Charles A. Rodetfeld	96 W. Main, Richmond, IN 47374 (317) 935-7626	50%
95.	Hapco Auto Parts	17	0	10,000	Richard Halpern	POB 311, Haysake, MA 01041 (413) 536-2250	40%
96.	O.K. Auto Supply Co.	17	0	8,500	William Larson	605 Elm St., Ishpeming, MI 49849 (906) 455-5181	20%
97.	H.E. Everson Auto	17	0	8,000	Kirk Sand	2904 Gateway Dr., Grand Forks, ND 58201 (701) 772-4839	25%
98.	Champion Auto Stores ⁷	16	30	75,000	Robert "Bud" Rose	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-5984	95%
99.	Hedahl's Automotive Centers	16	0	15,000	Dick Hedahl	100 E. Broadway, POB 1038, Bismarck, ND 58502-1038 (701) 223-8393	20%
100.	National Auto Stores	16	0	14,000	David M. Slean	2342 North Penn Rd., Hatfield, PA 19440 (215) 997-1300	70%
Total		7767	6078	8432,791*			

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* Automotive Marketing estimate for 1989.

¹ Includes company-owned stores only; with franchises total is 131.

² A member of the RPM (Roanoke, VA) buying group.

³ A member of the NAPA (Atlanta) programmed distribution group.

¹⁴ A member of the Federated Auto Parts (Staunton, VA) programmed distribution group.

¹⁵ A member of the Autovalue (Springfield, MO) programmed distribution group.

¹⁶ A member of the AAAP/Parts Plus (Memphis, TN) programmed distribution group.

¹⁷ A member of the Eagle Nation (Pearland, TX) programmed distribution group.